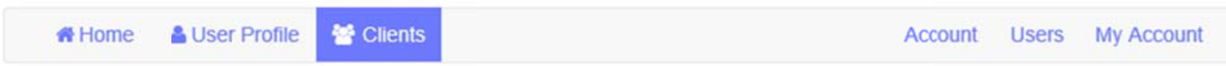
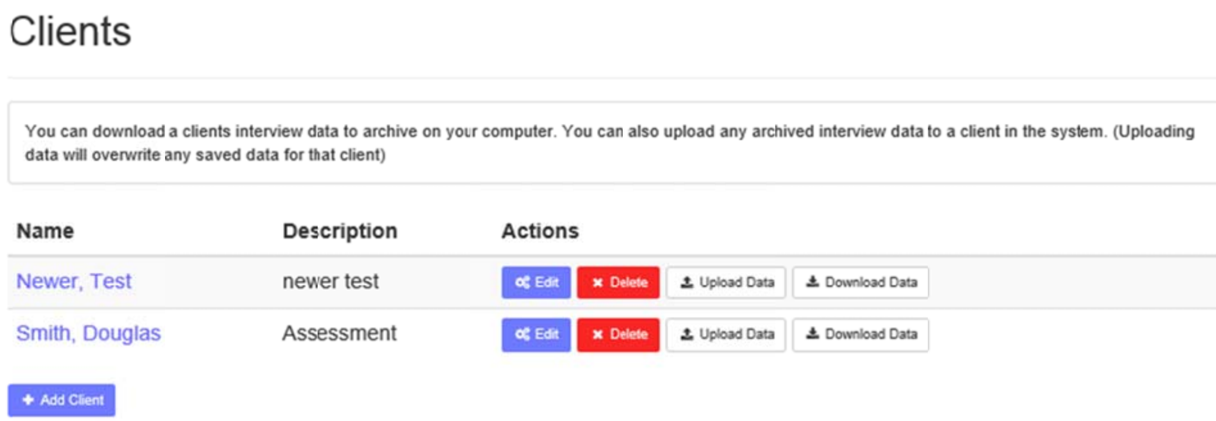
Managing Your Client Data

Each time you create a new client a new client dataset is created that stores information about the client. That client dataset can be selected whenever you want to input/edit information or assemble a document. Over time, you will accumulate a number of client datasets and you should either backup and/or delete those client datasets from the InsightFill server after you have entered information or prepared reports. To do this:

1. Click on the Clients tab in the Navigation menu.



2. The list of clients will appear:



3. On the Client page you can perform a number of functions:

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If you want to change the name or description for the client, click on the **Edit** button. That will allow you to change the First Name, Last Name and Description fields for the selected client.
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If you want to delete the client, click the **Delete** button. **We strongly recommend that before you delete a client, you should first click on the Download Data button and save the client information to your local computer. That way, you will be able to upload the data later on if you need it.**
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If you have entered a substantial amount of data for a client, you can create a backup of that data by clicking on the **Download Data** button. Your computer may automatically store these files in the Downloads folder on your computer in which case you may wish to move them to another folder so you can keep track of them. We recommend that you create a folder on your computer or local file server called **Client Datasets** where you can save these client datasets. This will allow you to more easily find them later on.

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If you want to upload a client dataset that you backed up previously, you can click on the **Upload Data** button. Before you click on this button you may need to add a client using the **Add Client** button. You will be prompted to select a client dataset file to upload and you may need to navigate to a folder where you have previously saved client datasets (the files will typically end in the words: "clientdata.xml" and the first part of the file name will be the client's name).
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If you want to add a new client to the list of clients you can click on the **Add Client** button near the bottom of the page: . You will be prompted for the First Name, Last Name and Description for that client. Click on the **Save** button to store the information for that client.

